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AFTERMARKET STATISTICAL SECTION

1990: A REVIEW OF AFTERMARKET NEWS

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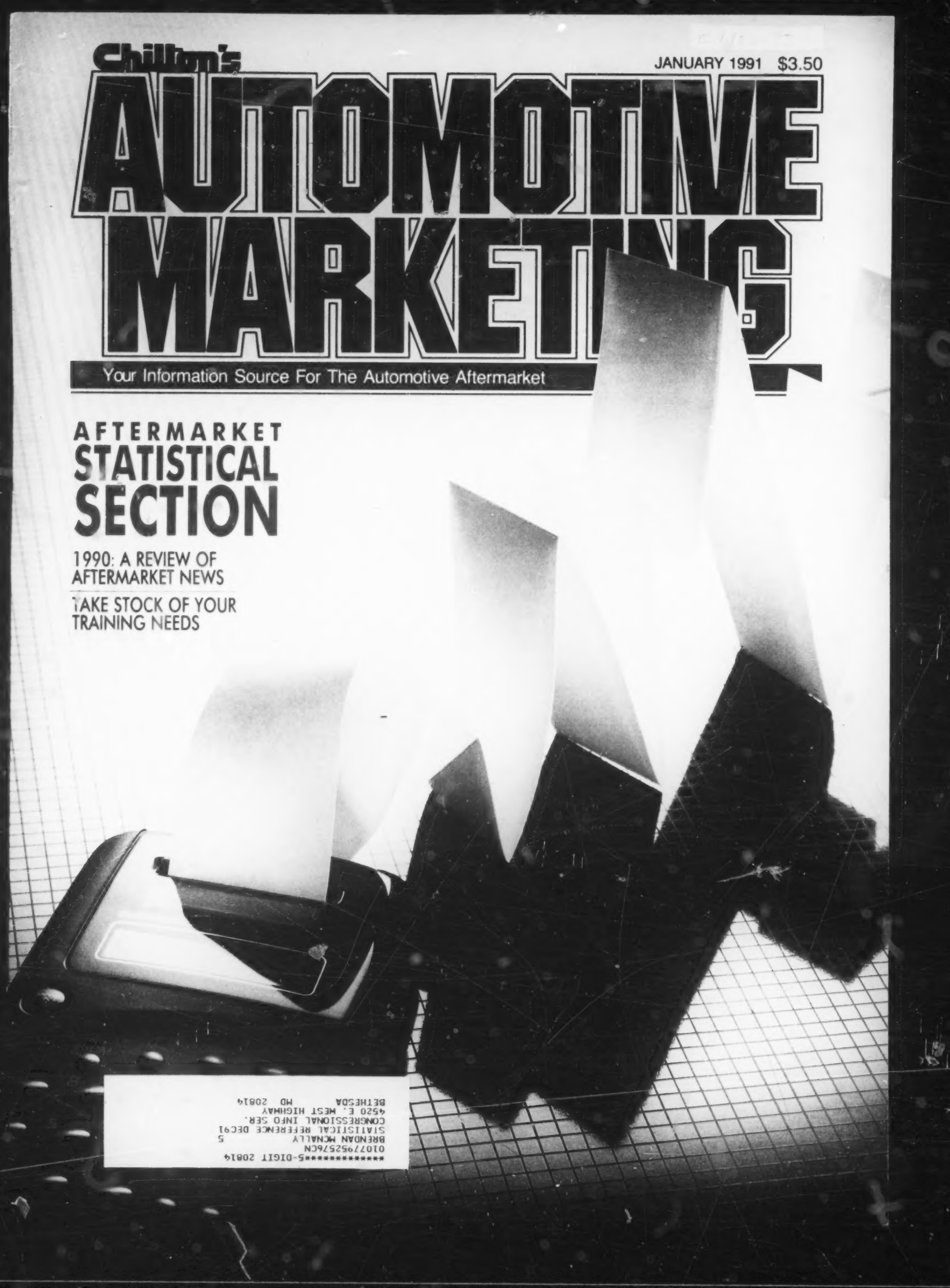

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AUTOMOTIVE MARKETING

JANUARY ISSUE/VOLUME 20, NUMBER 1

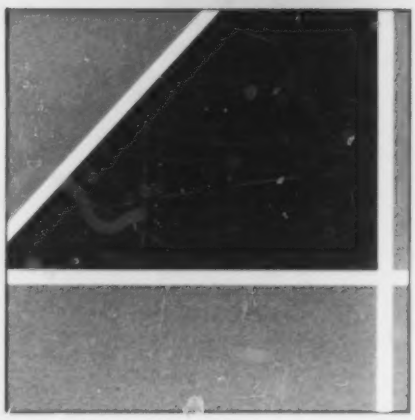
FEATURES

The Four Ages of the DIYer: DIYers Less Than 25-Years-Old 15

A look at young DIYers, what automotive products they buy, and where they buy them.

The *Automotive Marketing* Statistical Section 20

From the number of vehicles registered to the number of products sold, numbers make our market move. Here's a look at some of those numbers.



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JESSE H. NEAL AWARD-WINNING PUBLICATION FIVE OUT OF EIGHT YEARS

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safety and performance.

The first half of the decade, Miles said, we'll see:

- Fewer turbos and more superchargers
- All fuel injection
- Four speed automatic transmissions
- Better combustion chambers through computer modeling
- More emission parts

In the second half of the decade, Miles expects two-stroke engines, more work on diesels, and a mass produced electric car.

When it comes to suspensions, Richard Gray, director of vehicle evaluation at Nissan Research, Carson, CA, praised the new Nissan Infinity Q45's active suspension system that keeps the car level on all surfaces. He compared the system to a cheetah.

"There'll be no more vinyl, no wire wheels and no chrome glitz," John Herlitz, director of exterior design at Chrysler's Product Design Office in Highland Park, MI, said. Running through a series of show cars, Herlitz predicted space, convenience and visibility would influence 1990s designs. In the long term, environmental concerns mean recyclable cars are a possibility.

Hiroshi Arai, general manager of Electrical and Electronics Engineering for Toyota in Aichi, Japan, clearly predicted electronic innovations in four areas:

- More vehicle performance information
- Better and faster instrument readings
- Exterior information such as rear cameras and radar
- Internal communication and navigation systems

In terms of service, John King, manager of Parts and Service Engineering for Ford, Dearborn, MI, saw few changes in basics such as filters, plugs, belts and hoses. He did see retrofits in fuel injection and new software. Accessories will expand while service centers will stress quick diagnostics and replacements.

Finally, Jim Dick, manager of Marketing Technical Services for Exxon, Houston, examined the role of fuels and lubricants in keeping up with new technology. Higher octanes and better oils will be needed. ■

Recycling Rates For Various Materials

Tom Minner, who was recently named vice president and general manager of GNB's Automotive Battery Division, Atlanta, sent us an interesting chart on the percentage of recycling for various material. Some 92% of automotive batteries are recycled, according to GNB. The company's aim is 100%. GNB's Resource Recycling Division, based in St Paul, MN, and headed by general manager Ed Puckett, reclaims used batteries for GNB.

Product	Percentage Recycled
Automotive batteries	92%
Aluminum cans	55
Iron and steel	45
Copper	43
Paper	26
Glass bottles	20

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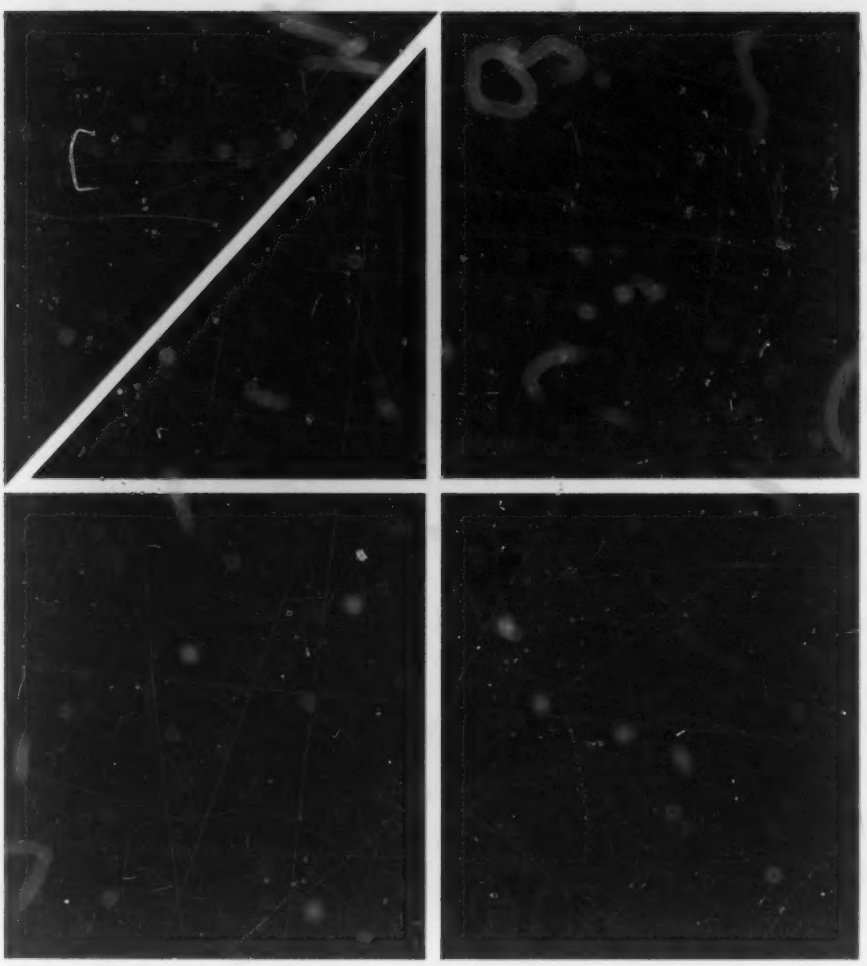
LESS THAN 25 YEARS OLD



How do DIYers differ by age? As the population grows older, retailers must know.

by **Phil Katcher,**
Business Editor

When one looks at the general population trends in the U.S., one is struck by what demographers are calling "the graying of America." The population is getting older. In the past, automotive retailers selling to DIYers depended on young hot rodders as a basic mainstay of their businesses. At the same time, they often wrote off the older segment of the population as less interested in—even less capable of—automotive DIY tasks.

This will have to change.

To face this trend, retailers have to know about DIYers according to their ages, their shopping trends, their vehicle maintenance trends, what they can and can't do, how much they can or can't spend on automotive products. Drawing on data from the 1990 *Automotive Marketing Consumer Automotive Repair Study (CARS)*, this article looks at young DIYers.

The Young DIYer

DIYers who are 25-years-old or younger are still a very good group to sell to. They like working on their cars. They've increased the amount of automotive DIY work they do over what they had done in the recent past. They plan to spend even more time doing this kind of work in the future.

Yet there's room for personal growth.

THE TOP FIVE PRODUCTS THEY PURCHASE AND INSTALL THEMSELVES

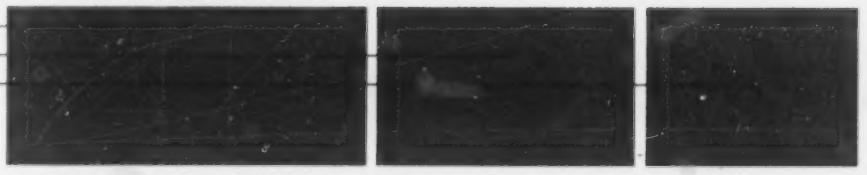
We asked DIYers 25 years old or younger what automotive products they bought and installed themselves

Motor Oil	89%
Antifreeze/coolant	69
Filters	65
Functional fluids	59
Wax/polish	56

HOW THEY SEE THEMSELVES AS DIYERS

We asked DIYers 25-years-old or younger how they saw themselves as automotive DIYers.

Medium	44%
Light	30
Dedicated	26



Right now, they're doing mostly easy tasks, the oil change type of job. They call themselves "moderate" rather than "dedicated" DIYers. And, they'd like to learn how to do more complicated jobs like rebuilding engines.

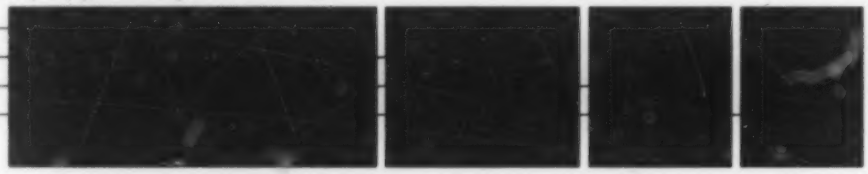
Most younger DIYers are male. At the same time, the study *1988 Buyers of New Cars*, produced for *Newsweek* Magazine, indicates that of all new car buyers 25-years-old or younger, only 39% are male. These younger new car buyers are often first time buyers whose vehicles are still under warranty. Others drive used cars.

Over half make less than $30,000 a year, while only 12% make more than $50,000 annually. However, the *Newsweek* study indicates that 36% of

HOW MUCH THEY ENJOY AUTOMOTIVE DIY WORK

We asked DIYers 25-years-old or younger how much they enjoyed working on their vehicles.

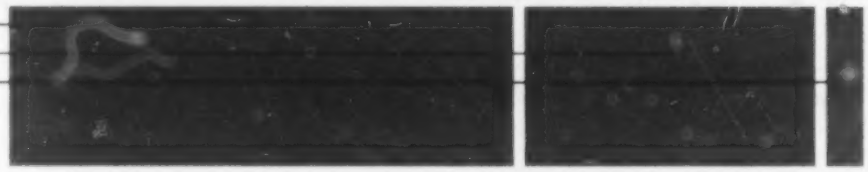
Somewhat	44%
A lot	24
Not too much	18
Not at all	15



IS THEIR DIY WORK LEVEL GROWING?

We asked DIYers 25-years-old or younger how their involvement level with automotive DIY work had changed over the past five years.

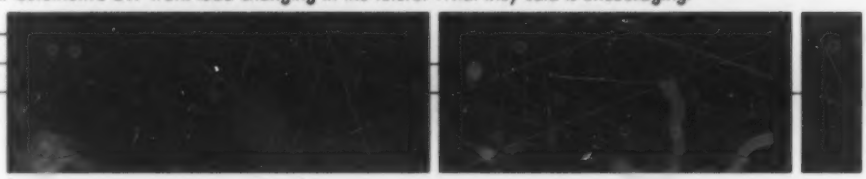
Increased	60%
Stayed the same	35
Decreased	5



WILL THEIR DIY WORK LEVEL GROW?

We asked DIYers 25-years-old or younger if they their automotive DIY work load changing in the future. What they said is encouraging.

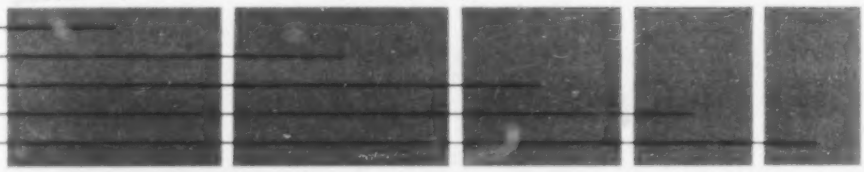
Will increase	50%
Will stay the same	42
Will decrease	8



WHAT DO THEY WANT TO LEARN TO DO?

We asked DIYers 25-years-old or younger what automotive jobs they'd like to learn how to do. The top five jobs are:

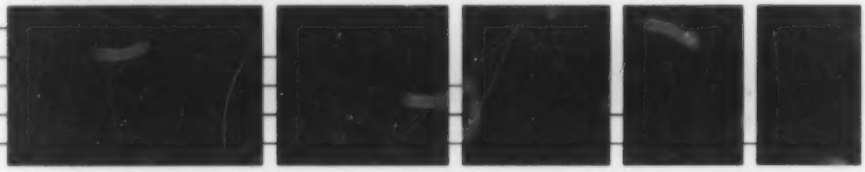
Oil change	12%
Rebuilding an engine	12
Body work	9
Tune-ups	7
Engine maintenance	6



HOW OFTEN DO THEY SHOP FOR AUTOMOTIVE PRODUCTS?

We asked DIYers 25-years-old or younger how often they shopped for automotive products annually.

More than 30 times	19%
Ten times	13
Monthly	11
Three times	9
Five times	6



WHERE THEY BUY AUTOMOTIVE PRODUCTS

We asked DIYers 25-years-old or younger where they shopped for automotive products.

Auto parts store	96%
Discount store	59
Gas station	48
Specialty stop	44
Department store	40

new car buyers 25-years-old or younger make $50,000 annually.

What They Drive

Domestic car brands are still big sellers with this group. Chevrolet tops the list of cars they drive, followed closely by Ford. And, Pontiac is the fifth biggest seller, with two Japanese imports completing the top five list. Among new car buyers 25-years-old or younger, according to *Newsweek*, 39% bought Asian-made cars while only 9% bought domestic cars.

Apparently there are a number of students in this group. In all, just over a third say they have some college, while only 17% have finished college.

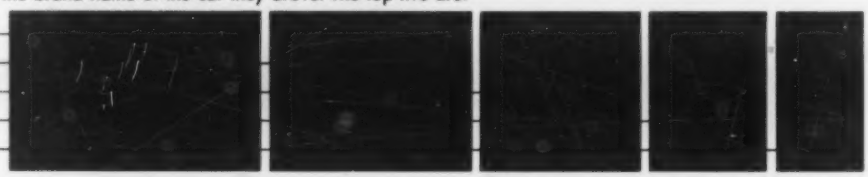
Most younger DIYers, too, have never been married. This frees up discretionary dollars for automotive parts, chemicals, and accessories—purchases that might otherwise go to establishing new homes. The National Association of College Stores, Oberlin, OH, found that 10% of all college discretionary income was spent on car care, only slightly less than was spend on the two biggest budget items, food and clothing.

So, the bulk of DIYers 25-years-old or younger are single male students who own used domestic vehicle and now must maintain it themselves because they can't afford professional mechanics. However, they enjoy doing the work and see themselves doing even more of it in the future. And, since virtually all of them buy automotive products at auto parts stores, the future looks good for the overall industry's future. ■

WHAT DO THEY DRIVE?

We asked DIYers 25-years-old or younger what was the brand name of the car they drove. The top five are:

Chevrolet	19%
Ford	16
Toyota	11
Honda	6
Pontiac	5



HOW WELL THEY'RE EDUCATED

We asked DIYers 25-years-old or younger what level of education they'd reached.

Some college	35%
High school graduate	33
College graduate	17
Less than high school	15

THEIR MARITAL STATUS

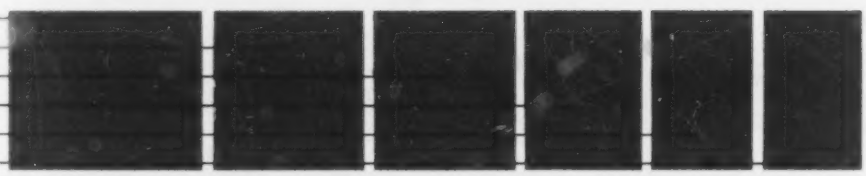
We asked DIYers 25-years-old or younger what their marital status was. Most are still single.

Never married	74%
Married	22
Divorced/separated	4
Widowed	0

THEIR INCOME RANGE

We asked DIYers 25-years-old or younger how much their total household income was.

$20-30,000	22%
$10-20,000	18
Less than $10,000	17
$40-50,000	14
$30-40,000	12
Over $50,000	12

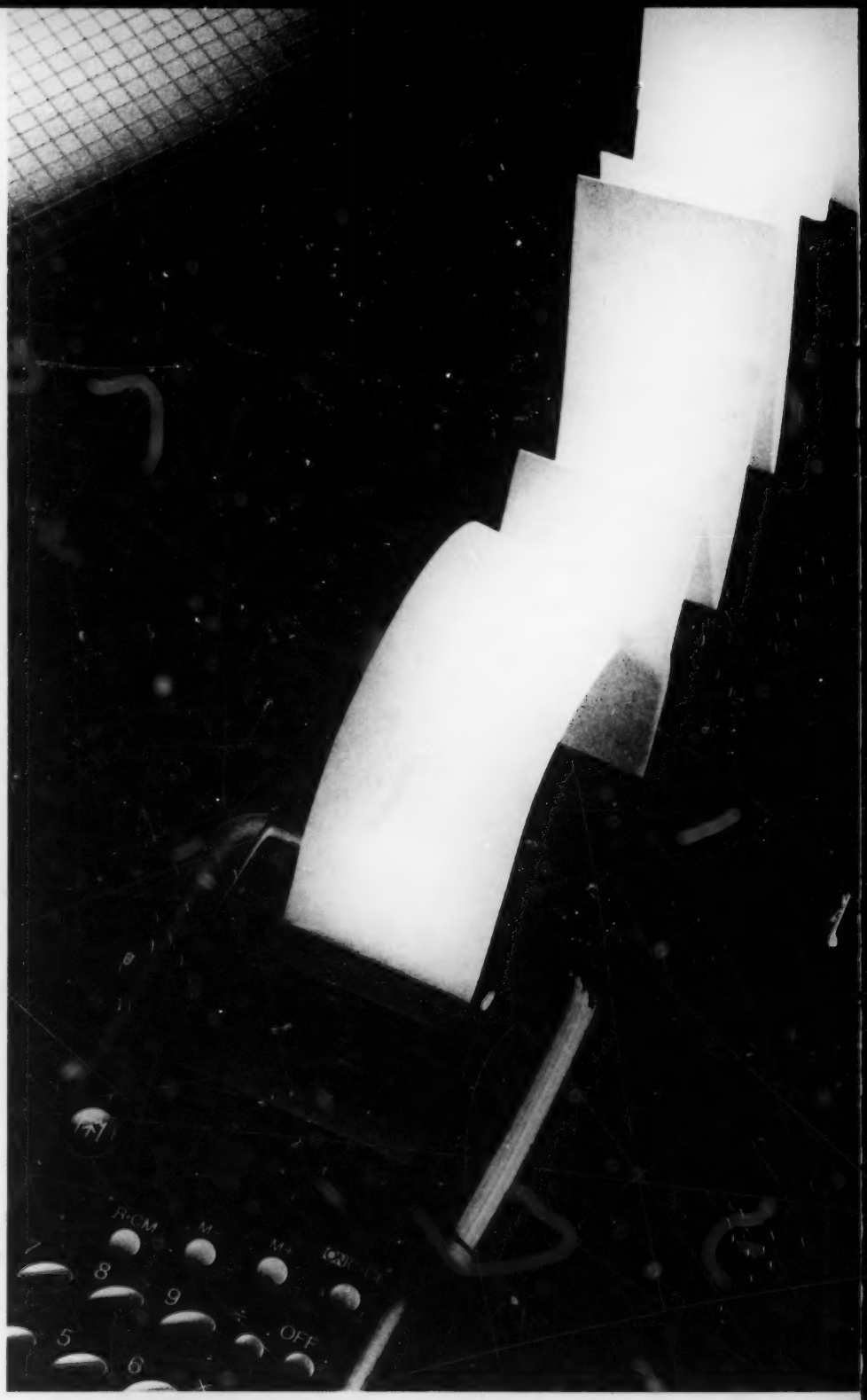


THEIR SEX

We asked DIYers 25-years-old or younger if they were men or women.

Male	65%
Female	35

(Answers may not equal 100% due to rounding and refusals to answer)



AFTERMARKET STATISTICAL SECTION

Everyone's crying recession. But sales of some categories were up in 1989.

by Phil Katcher, Business Editor

Sales of some aftermarket products really jumped in 1989 when compared to 1988. Exterior cleaners, such as wax and polish and tire cleaners, took a record leap from 15,264,637 to 31,643,000 containers sold. Motor oil went from 1,105,750,000 to 2,393,000,000 gallons. Containers of refrigerants went from 84,967,712 to 96,131,000. Brake cleaner sales went from 27,873,209 containers to 29,472,000.

Smaller, but real gains were posted by replacement batteries which went from 63,847,000 to 64,433,000. Engine degreaser sales rose from 25,247,390 to 26,295,000 containers. Windshield and lock deicer container sales rose slightly from 5,354,029 to 5,549,000.

On the other hand, sales of antifreeze/coolant, which went from 140,890,160 separate gallons to 90,892,867 separate gallons, fell. Carb and choke cleaner sales fell from 53,434,555 containers to 47,146,000 containers. These were, however, the only two products for which there are hard, reliable sales data which indicated a decline.

As well, the total American fleet of cars and light trucks grew from 171,609,549 in 1987 to 184,396,732 in 1988. This bodes well for the continued growth of the aftermarket in the long run.

Some New Data

This year, we've enlarged the *Automotive Marketing* Statistical Section with some new data.

For example, one chart examines what specific age groups spent on transportation, transportation (read personal vehicle) repairs and maintenance, and gas and oil. The baby boomer generation is clearly spending the big bucks in this area. They are the audience to be pursued. But, it's just as clear that other age groups do spend significant sums and should not be ignored.

Another interesting set of data compiled from U.S. Department of Commerce figures compares warehouse distributors to what they still call "home and auto stores." In the last year they studied, 1987, almost 29,000 WDs had sales of $62,455,757,000. At the same time, 46,207 home and auto stores had sales of only $25,460,270,000!

How Many Retailers Are There?

Another especially interesting item lists the numbers given by several different sources, drawn from different studies, of how many aftermarket auto parts store retailers there are. Most seem to group the number around 45,000 retailers. However, the numbers vary from 34,200 given by the Specialty Market Equipment Association, Diamond Bar, CA, to 60,290 given by American Business Information, Omaha, NE.

The latter, large number comes from a compilation of yellow pages listings under "auto parts and accessories, new" or some variation thereof. In a rough, ad-

PRIME DIYERS' CARS

DIYers do the most work on cars that are around seven years old instead of newer or older. Stocking, therefore, to meet their demands requires knowing what sort of cars sold best seven years ago. Below, we list the 1984 car models and the numbers of each specific model sold that year. The scrappage rate of cars in use on July 1, 1984 was 6.1%, according to Paine Webber, New York.

Cars	Number sold
Alfa Romeo	3,702
AMC	
Eagle	20,654
Renault Alliance	100,366
Renault Encore	69,235
Audi	
5000	41,067
4000	15,278
5000 Turbo	6,380
Quattro 4000	3,923
Coupe	3,508
Quattro Turbo	64
BMW	
318i	28,661
325e	15,772
528e	10,533
735i (733i)	8,359
535i (533i)	4,876
635i (633CSi)	2,697
Chrysler Corp.	
Plymouth	
Turismo (TC3)	47,109
Horizon 4-door	78,298
Reliant	138,154
Caravelle	9,074
Gran Fury	16,609
Colt	32,819
Vista	7,465
Conquest	3,013
Sapporo	331
Chrysler	
LeBaron	98,842
LeBaron GTS	2,494
Cordoba	124
Fifth Avenue	94,340
New Yorker	79,568
Laser	53,131
Dodge	
Charger (O24)	51,940
Omni 4-door	67,933
Aires	111,984
Daytona	44,717
Dodge 600/400	61,828
Lancer	1,980
Diplomat	28,623
Colt	36,560
Vista	7,805
Conquest	3,220
Challenger	505
Miranda (Magnum)	250
Fiat	
Ferrari	568
Spider	208
Lancia	27
X 1/9	143
Strada	40
Ford Motor Co.	
Ford	
Ford	169,253
Thunderbird	154,865
LTD	196,907
Tempo	256,532
Escort	353,578
EXP	31,213
Mustang	138,296
Mercury	
Mercury	143,594
Cougar/XR7	120,964
Marquis	103,722
Topaz	73,454
Lynx	67,725
Capri	17,739
Lincoln	
Lincoln	90,869
Mark	29,496
Continental	31,110
General Motors	
Chevrolet	
Chevrolet	258,902
Corvette	30,424
Monte Carlo	116,820
Celebrity	322,189
Camaro	202,172
Citation	92,174
Cavalier	377,545
Chevette	164,917
Sprint	10,927
Spectrum	2,077
Pontiac	
Pontiac	62,084
Grand Prix	71,609
6000	191,219
Grand Am	16,751
Firebird	101,414
Phoenix	13,202
Fiero	93,485
Sunbird/2000	126,916
1000	28,004
Oldsmobile	
Oldsmobile	358,712
Toronado	41,605
Calais	14,881
Cutlass/Ciera	544,296
Omega	34,103
Forenza (Starfire)	62,456
Buick	
Buick	248,728
Riviera	53,398
Somerset	13,811
Century/Regal	399,227
Skylark	104,589
Skyhawk	121,858
Cadillac	
Cadillac	195,177
Eldorado	70,577
Seville	36,249
Cimarron	18,014
Honda	
Accord	123,049
Civic	137,401
Prelude	66,924
CRX	45,221
Isuzu	17,233
Jaguar	18,044
Mazda	
626	70,135
RX7	54,310
GLC	45,221
Mercedes-Benz	
190E	17,704
300D	16,659
300SD	12,889
380SL	9,288
380SE	7,135
190D	5,309
500 SEL	4,557
300 TD	2,465
500 SEC	1,651
Mitsubishi	
Tredia	13,724
Cordia	13,194
Starion	6,375
Mirage	3,101
Galant	2,710
Nissan	
Sentra	189,488
300 ZX	73,101
Maxima	68,209
200 SX	63,466
Stanza	44,612
Pulsar NX	37,284
Peugeot	
505	15,908
505 Turbodiesel	3,815
604 Turbodiesel	284
Porsche	19,611
Renault	
Fuego	9,272
Sportwagon	2,971
Saab	
900 Turbo	14,408
900S	9,991
900	8,369
Subaru	
DL/GF FWD	101,555
DL/GF 4WD	50,988
Brat	4,840
Toyota	
Corolla	157,875
Tercel	103,013
Camry	93,725
Celica	85,213
Cressida	34,466
Van	33,626
Supra	29,871
4Runner SR5	6,498
Land Cruiser	4,037
Starlet	260
Volkswagen	
Jetta	37,750
Quantum	18,055
Vanagon	17,399
Scirocco	17,138
Cabriolet	11,068
Volvo	
DL	44,339
GL	24,271
GLT	9,866
Diesel	5,589
760 Turbo	4,794
760 GLE V6	4,078
760 Turbodiesel	3,485
740 GLE	1,446
740 Turbo	47

Sources: Domestic car data, Motor Vehicle Manufacturers Association. Imported car data, copyright 1985, Ward's Communications, Inc. Reprinted with permission.

PERSONAL CONSUMPTION EXPENDITURES FOR TRANSPORTATION (in millions)

	1966	1968	1970	1972	1974	1976	1978	1980	1982	1984	1986	1987	1988	1989
Tires, Parts, Accessories	3,434	3,944	6,065	7,970	9,639	11,367	13,706	16,684	20,234	23,421	26,481	28,693	31,294	32,420
Repairs [1]	7,393	8,864	11,248	13,922	17,615	22,134	28,016	32,327	35,441	42,838	51,952	55,501	62,476	69,754
Gas, Oil	15,962	18,422	21,997	24,879	36,293	43,046	51,301	83,721	89,090	90,006	73,457	75,162	76,786	83,952

[1] Includes lubricating, washing, parking, storage, and rental

Source: Motor Vehicle Manufacturers Association; U.S. Department of Commerce, Bureau of Economic Analysis

mittedly unscientific study *Automotive Marketing* conducted by scanning a number of different volumes of yellow pages about a third of the companies listed appear to be new car dealers who take a multiple listing under auto parts as well as under automobiles. If this rough third were true nationally, it would remove some 20,000 from the large number to bring it into general agreement with the other estimates.

PERSONAL CONSUMPTION EXPENDITURES FOR TRANSPORTATION BY AGE GROUP

(Total households in thousands and average annual expenditures for the year 1988 by age of households)

	Total /Ava	-25	25-34	35-44	45-54	55-64	64-74	75+
All Households	94,562	7,216	21,985	19,911	13,601	12,546	11,319	8,284
All Transportation	$5,093	$3,911	$5,479	$6,369	$6,641	$4,603	$3,975	$1,760
Repairs & Maintenance	$ 553	$ 361	$ 524	$ 744	$ 666	$ 587	$ 442	$ 253
Gas, Oil	$ 932	$ 659	$ 923	$1,152	$1,243	$ 970	$ 729	$ 367

Source: Margaret Ambry, "The Age Of Spending," *American Demographics* Magazine, November, 1990, p. 20

State	Passenger Cars 1975	Passenger Cars 1985	Passenger Cars 1988	Light Trucks 1988	Total Fleet 1988
Alabama	1,900,295	2,343,261	2,919,814	845,564	3,880,981
Alaska	142,717	219,590	229,279	114,519	361,883
Arizona	1,064,348	1,562,722	1,927,503	729,195	2,704,872
Arkansas	864,803	900,065	844,810	509,559	1,427,050
California	11,226,325	14,723,189	16,496,522	3,660,324	21,336,964
Colorado	1,439,779	2,016,522	2,121,998	687,680	2,923,471
Connecticut	1,793,158	2,306,432	2,490,237	118,196	2,651,927
Delaware	289,164	369,407	397,286	94,604	511,940
District of Columbia	236,010	308,343	247,136	7,547	264,023
Florida	4,449,154	7,849,144	8,713,198	1,749,745	10,983,654
Georgia	2,509,519	3,358,953	3,690,981	1,322,590	5,196,220
Hawaii	349,619	569,086	613,750	76,121	704,711
Idaho	406,593	531,854	594,228	288,392	940,178
Illinois	5,350,375	6,104,331	6,403,462	1,161,021	7,864,935
Indiana	2,565,270	2,988,820	3,069,935	845,188	4,169,246
Iowa	1,542,796	1,937,601	1,817,383	537,050	2,567,746
Kansas	1,241,497	1,474,205	1,523,226	547,247	2,209,913
Kentucky	1,675,990	1,773,567	1,861,754	792,130	2,795,077
Louisiana	1,661,389	2,067,013	1,970,360	875,316	2,937,549
Maine	499,474	620,473	709,075	190,751	941,273
Maryland	2,072,302	2,720,700	2,857,979	518,772	3,468,247
Massachusetts	2,775,670	3,268,503	3,322,044	405,074	3,818,312
Michigan	4,627,816	5,356,975	5,556,109	1,263,425	7,141,491
Minnesota	1,952,401	2,625,831	2,503,362	511,008	3,210,357
Mississippi	989,844	1,329,424	1,362,686	353,267	1,786,859
Missouri	2,177,361	2,622,141	2,707,929	922,787	3,794,442
Montana	370,000	394,510	430,072	229,109	722,554
Nebraska	824,285	835,785	877,894	336,782	1,328,232
Nevada	345,648	511,760	574,212	209,511	808,303
New Hampshire	404,574	613,600	733,529	161,355	928,114
New Jersey	3,735,985	4,413,999	5,222,761	356,375	5,737,852
New Mexico	554,578	746,068	788,415	428,918	1,266,560
New York	6,735,148	7,901,004	8,558,985	1,057,584	9,837,608
North Carolina	2,860,249	3,247,486	3,597,092	1,179,694	5,022,628
North Dakota	330,851	381,200	385,028	194,554	655,084
Ohio	6,206,000	6,288,050	7,003,826	1,328,486	8,612,018
Oklahoma	1,432,477	1,854,553	1,666,947	743,685	2,554,018
Oregon	1,331,000	1,320,294	1,749,425	444,694	2,315,691
Pennsylvania	6,589,466	5,889,416	6,253,550	1,143,636	7,766,029
Rhode Island	498,777	518,896	555,313	95,638	670,813
South Carolina	1,400,479	1,683,435	1,799,425	540,376	2,413,912
South Dakota	336,062	404,220	413,668	231,499	692,632
Tennessee	2,092,996	2,944,971	3,373,276	739,966	4,225,490
Texas	6,217,464	8,562,581	8,455,744	3,415,580	12,406,213
Utah	587,133	739,627	786,942	328,706	1,159,435
Vermont	233,390	301,435	334,428	102,665	452,846
Virginia	2,709,506	3,641,696	3,625,109	891,217	4,670,337
Washington	1,883,271	2,484,484	2,753,299	969,567	3,887,314
West Virginia	734,659	818,678	906,488	315,573	1,286,634
Wisconsin	2,126,273	2,457,806	3,169,217	596,827	3,901,106
Wyoming	202,267	286,118	285,190	151,426	481,988
Total	106,712,551	132,108,164	141,251,695	35,320,494	184,396,732

Sources: Motor Vehicle Manufacturers Association, U.S. Department of Transportation's Table MV-9

(A comparison of various estimates)

Study	Year	Stores
Census [1]	1987	46,207
FAIR [2]	1989	40,000
Directories [3]	1989	60,290
Directory [4]	1989	40,900
Market Study [5]	1989	34,200

[1] "Home and auto stores," U.S. Department of Commerce, Bureau of the Census, 1987 Economic Census.
[2] "Auto parts," *The Retail Distribution of Automotive Products*, Automotive Parts & Accessories Association, Bethesda, MD, 1989, p. iv.
[3] "Auto parts and accessories retailers," American Business Information, Omaha, NE.
[4] "Auto parts stores," *1989/90 Directory of Automotive Aftermarket Suppliers*, Lebhar-Friedman, Inc., New York, p. xxii.
[5] "Automotive Chain Stores" and "Full-Line Auto Parts Stores," *1990 SEMA Market Study*, Specialty Equipment Market Association, Diamond Bar, CA, p. 3.

Item	Unit	1989
Batteries, Replacement	Units	64,433,000
Antifreeze/ Coolant	Separate gallons	90,892,867
Cleaners, Brake	Containers	29,472,000
Cleaners, Carb & Choke	Containers	47,146,000
Cleaners, Exterior	Containers	31,643,000
Degreasers, Engine	Containers	26,295,000
De-Icers, Windshield, Lock	Containers	5,549,000
Motor Oil	Gallons	2,393,000,000
Refrigerants	Containers	96,131,000
Tire Inflators & Sealants	Containers	33,958,000
Tires	Units	153,281,000

Sources: Chemical Specialties Manufacturers Association, Battery Council International, National Petroleum Refiners Association

Item	1982	1987
Wholesalers		
Wholesalers	28,712	28,901
Wholesale Sales (+000)	$44,611,647	$62,455,757
Wholesaler Payroll (+000)	$ 4,415,328	$ 5,478,009
Wholesaler Employees	268,406	279,562
Home and Auto Stores		
H&A Stores	40,896	46,207
H&A Sales (+000)	$19,638,244	$25,460,270
H&A Payroll (+000)	$ 3,072,341	$ 4,151,948
H&A Employees	229,139	286,155

Source: U.S. Department of Commerce, Bureau of the Census, 1987 Economic Census, September, November 1989

(In millions of dollars)

Item	1982	1987
Ball Joints	$59	$53
Brake Rotors	24	38
Brake Shoes	44	109
Exhaust Pipes	230	303
Filters, Fuel	42	52
Filters, Oil	403	514
Mufflers	266	358
Universal Joints	57	130
Wheels, Aluminum	46	36
Wheels, Steel	163	88
Wiper Blades	5	35

Source: U.S. Department of Commerce, Bureau of the Census, 1987 Census of Manufactures, July 1989

In 1984, by the way, the Automotive Parts & Accessories Association, Bethesda, MD, released through The Foundation for Aftermarket Research (FAIR) figures indicating that in 1983 there were 38,000 auto parts stores. ■